



Instructions for Ordering IT Goods and Services by In Scope eVA Interface Executive Branch Agencies

July 1, 2006

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General Instructions

1. **Definitions: IT goods and services as related to these instructions are defined by the list provided at the following site:**

<http://www.vita.virginia.gov/>

Click “Supply Chain Management”

Click “How to Buy”

Click “VITA's IT Goods and Services List (In-scope/Out-of-scope)”

- Infrastructure goods and services are those indicated in the in/out-of-scope list as “in Scope”.
2. **Orders for IT Infrastructure Goods and Services:** For infrastructure goods and services, agency delegated procurement authority is 0. All orders for infrastructure IT goods and services must be routed to VITA for review and approval. This is accomplished by selecting the appropriate eVA “V” PO Category when entering the order.
 - The eVA order will be created as a non-catalog order.
 - The Vendor selected will be Virginia Information Technologies Agency – Infrastructure
 - The order dollar value will be 0.
 - When the request is received at VITA, it will be reviewed and pricing established based on the agency MOU. The price seen by the agency AITR in their approval action will be the incremental additional monthly MOU billing to the agency by VITA.
 - In the description field enter the specifications of the product or service required. If there is a desired vendor, model, etc., provide that information in the description or comments. If there are lengthy specifications, these should be provided by attachment to the eVA requisition.
 - Enter your agency Bill To address.
 - The use of Pcards is not authorized for infrastructure eVA orders.
 - Do Not use the VITA Bill To address. (Virginia Information Technologies Agency - E136).
 - Avoid the use of Lot for Unit of Measure because of problems in receiving incremental shipments.
 - eVa receiving must be used for all infrastructure orders.
 - The Agency AITR must approve all infrastructure orders in eVA. Instructions on approval are provided on page 5 of this document.
 3. **Orders for non-infrastructure IT Goods and Services Greater than \$50,000:** Agencies have been granted \$50,000 of procurement authority for non-infrastructure IT goods and services. All orders greater than \$50,000 for IT goods and services (infrastructure, Non-infrastructure, contract or non-contract) must be routed to VITA for review. This is accomplished by entering the “V” PO Category code for any IT order greater than \$50,000.

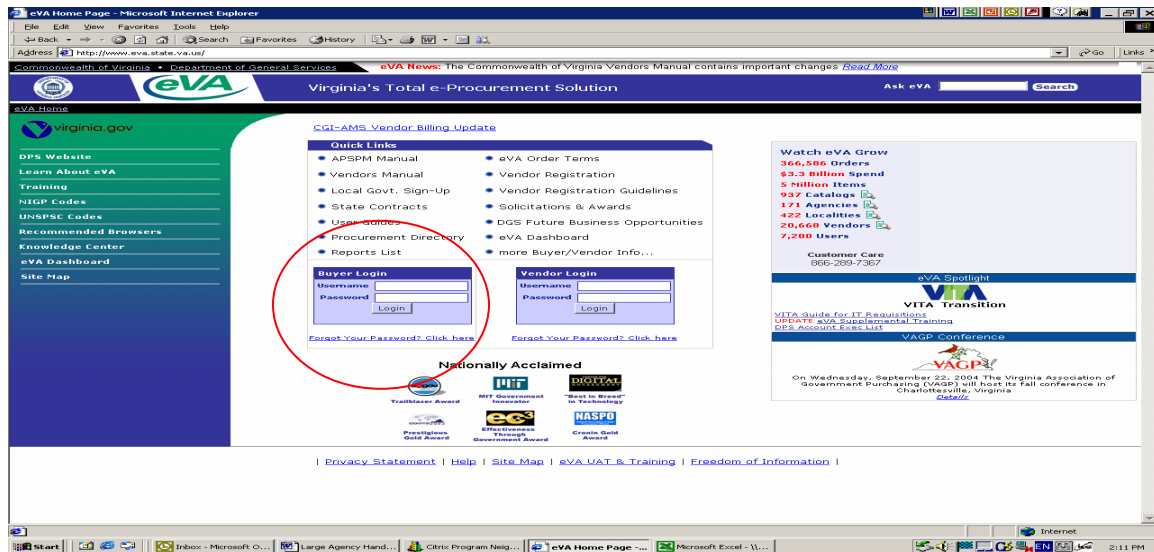
- VITA has delegated agencies procurement authority for non-infrastructure IT goods and services up to \$50,000. For requirements above \$50,000, VITA retains procurement authority unless specifically delegated to the agency on an exception basis in writing.
 - If the agency has been granted an exception to conduct an IT procurement over \$50,000, the “V” PO Category code must be entered on the resulting requisition to route the transaction to VITA for final review and approval.
 - For non-infrastructure orders from an existing contract, enter the actual supplier as the vendor and enter the agency Bill To.
 - For non-infrastructure sole source orders, enter the actual supplier as the vendor and enter the agency Bill To and attach an approved sole source document.
 - If the agency **has not been granted a delegation of authority** for an order greater than \$50,000, enter Virginia Information Technologies Agency as the vendor with the agency Bill To. Attach the specifications and any known sources that VITA should solicit in the requisition. The vendor information can be provided in the description, in the comments block or provided as an attachment.
 - Any order to a non-eVA vendor using the “V” PO Category must use Virginia Information Technologies as the supplier.
 - eVA receiving must be used for all infrastructure orders but is not required by VITA for non-infrastructure IT goods and services.
4. **Receiving Infrastructure Orders:** Receiving of orders for infrastructure goods and services is not for the purpose of paying a vendor directly for the services. Instead, the receipt is for the purpose of confirming that the requested service has been received.

In addition, the notification of a need to receive will not occur in the standard fashion. The service requested will be delivered by VITA’s partner, Northrup Grumman, based on a delivery ticket. This ticket will reference the original agency Purchase Order number and request this person pass the information to the receiver to complete the eVA receiving.

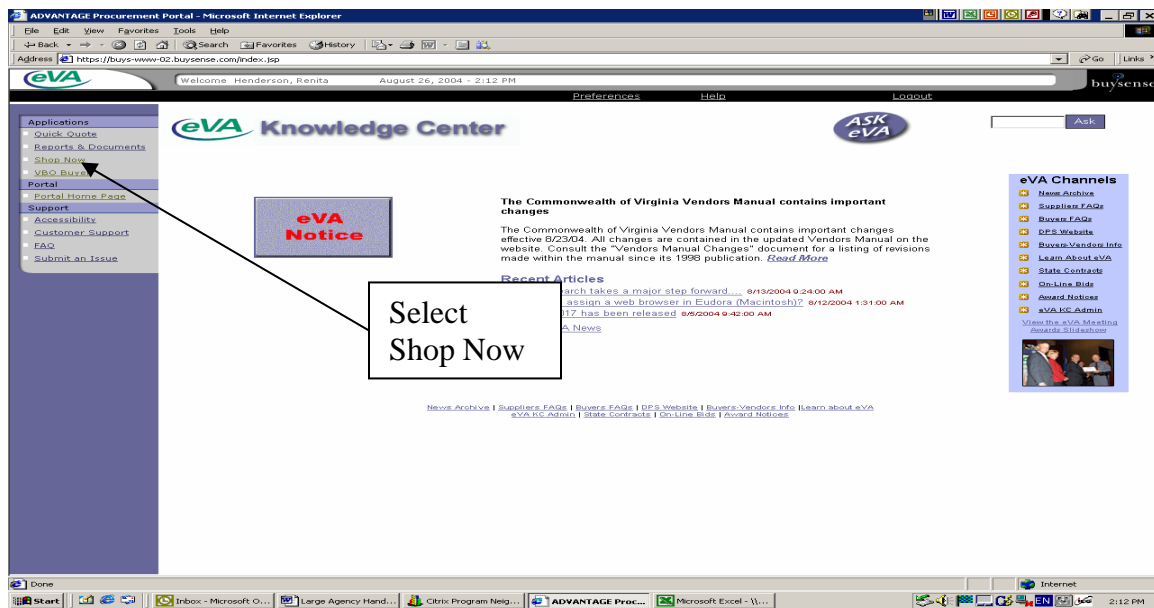
- Receiving for all IT infrastructure goods and services orders must be accomplished in eVA.
- When an order reaches the Ordered status, a receiving document is created and placed in the eVA receiving in-box of the person designated to do the receiving.
- Once the item is received and accepted, eVA receiving should be accomplished by the designated person.

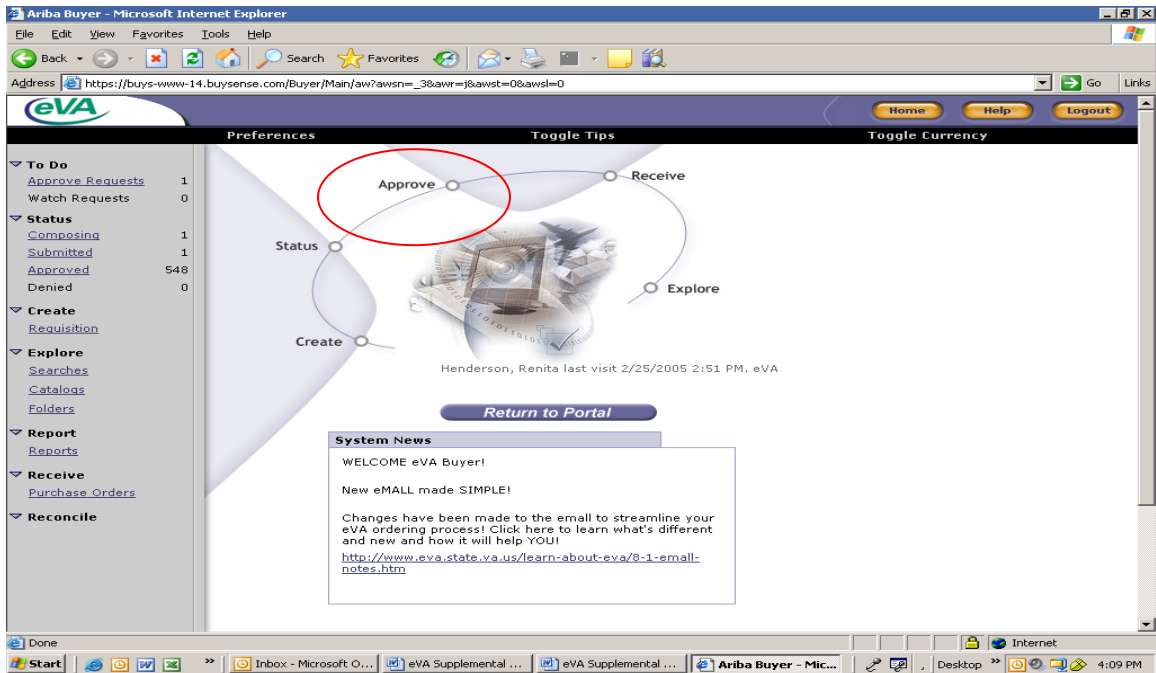
Approval Process:

To login go to www.eva.state.va.us

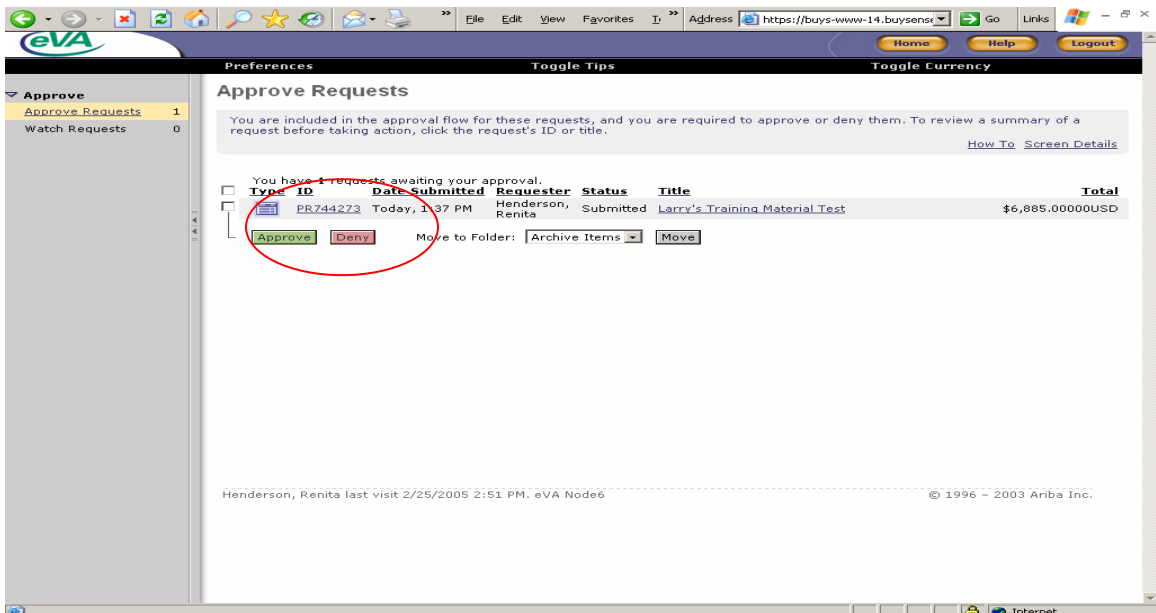


- Enter your assigned user name and password.
- If you forget your password or block your account, click on the Password Problems link below the Buyer Login block and follow the instructions to re-set your password. You will receive an email with a new password.

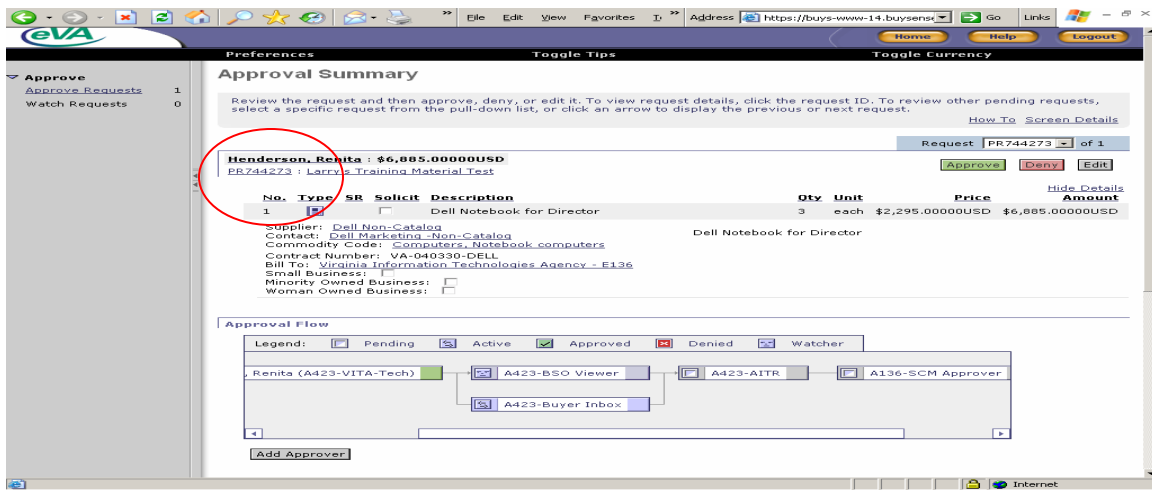




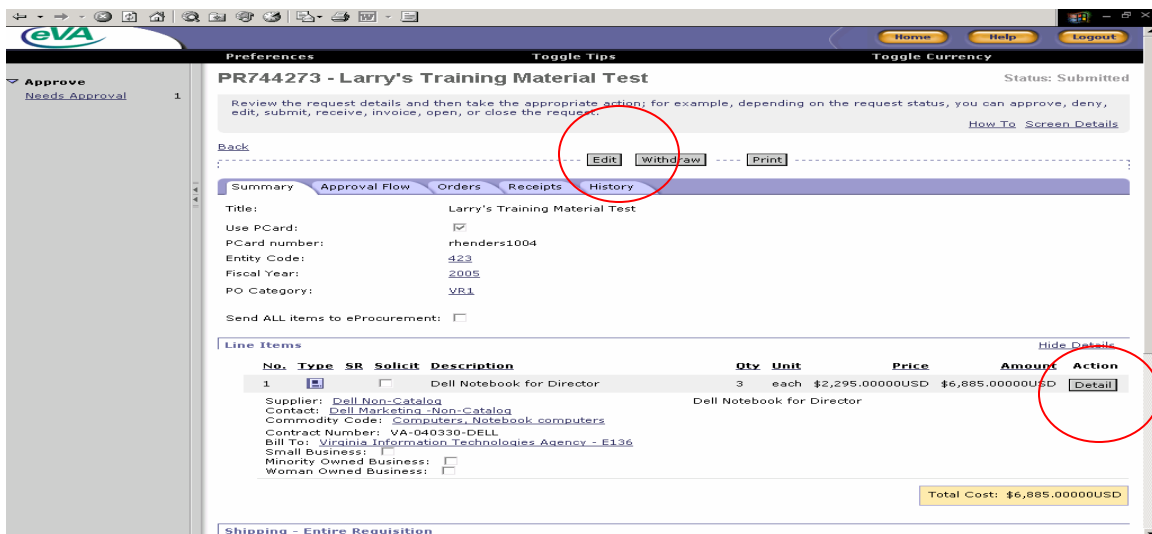
- In this instance there is only one requisition for approval as shown under the To Do heading.
- Click the Approve button to open the approval in box.



- The requisition could be approved from here. However, this should not be done since the requisition detail has not been reviewed.
- Click on the PR number to open the requisition for review.



- At this screen you can review each line item on the requisition.
- In addition, you are shown the workflow for this requisition.
- Click on the requisition number to open the requisition for additional review.



- You must click Edit if you need to change the requisition. You can edit only if you have been given Edit Approval authority in your eVA personal user profile. It is not anticipated that there would be any need to edit at this point since the requisition will have already gone through a technical review at the agency level as well as at VITA.
- The primary purpose for the AITR review is for the acceptance of the financial obligation created by the order.
- Changes/edits to the requisition will start the approval process over.
- Click on Detail to review the remainder of the requisition.

PR744273: Larry's Training Material Test
Items: 1 Total: \$6,885.000000USD

Review line item details, such as accounting and shipping information.

[How To](#) [Screen Details](#)

Line Item Details

No.: 1
Description: Dell Notebook for Director
Supplier Part Number: Dell-12345
Supplier Auxiliary Part ID:
Quantity: 3
Unit of Measure: each
Price: \$2,295.000000USD
Commodity Code: [Computers, Notebook computers](#)
Supplier: [Dell Non-Catalog](#)
Contact: [Dell Marketing - Non-Catalog](#)
Contract #: VA-040330-DELL
Small Business: ☐
Minority Business: ☐
Woman Owned Business: ☐
NIGP CommodityCode:
Bill To: [Virginia Information Technologies Agency - E136](#)
Additional Data:

Accounting - by Line Item

Fund Detail: 0100
Program/Sub-Program: 50204

Minority Business: ☐
Woman Owned Business: ☐
NIGP CommodityCode:
Bill To: [Virginia Information Technologies Agency - E136](#)
Additional Data:

Accounting - by Line Item

Fund Detail: 0100
Program/Sub-Program: 50204
Sub Object: 2212
Cost Center: 285
Project: 66015

VITA Agency Use: 423
Grant:

Shipping - by Line Item

Ship To: [Dept of Historic Resources-Admin Services](#)
Deliver To: Renita Henderson
Need-by Date: ? Fri, 11 Mar, 2005

Comments - by Line Item

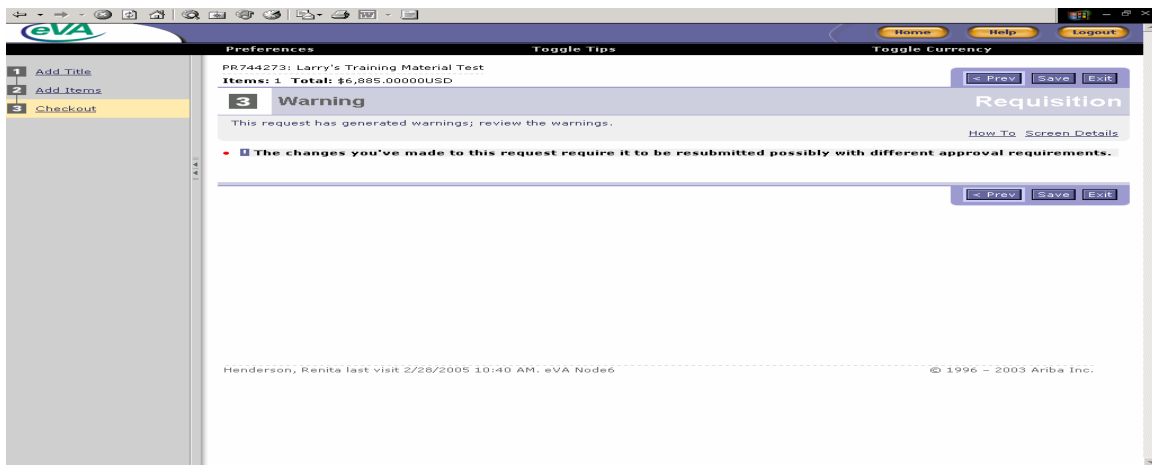
[Add Comment](#)

[OK](#)

Henderson, Renita last visit 2/28/2005 6:17 AM. eVA Node5

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- Review and edit as appropriate.



- When an edited requisition is saved, the above message will appear indicating that the workflow will re-fire because of the edit of the requisition. Since the requisition has changed it is appropriate that previous approvers review and approve again. (This example is assumed to be the edit of the Tech Configuration approver.)
- Click the Save button again and the requisition will go back into the approval workflow.

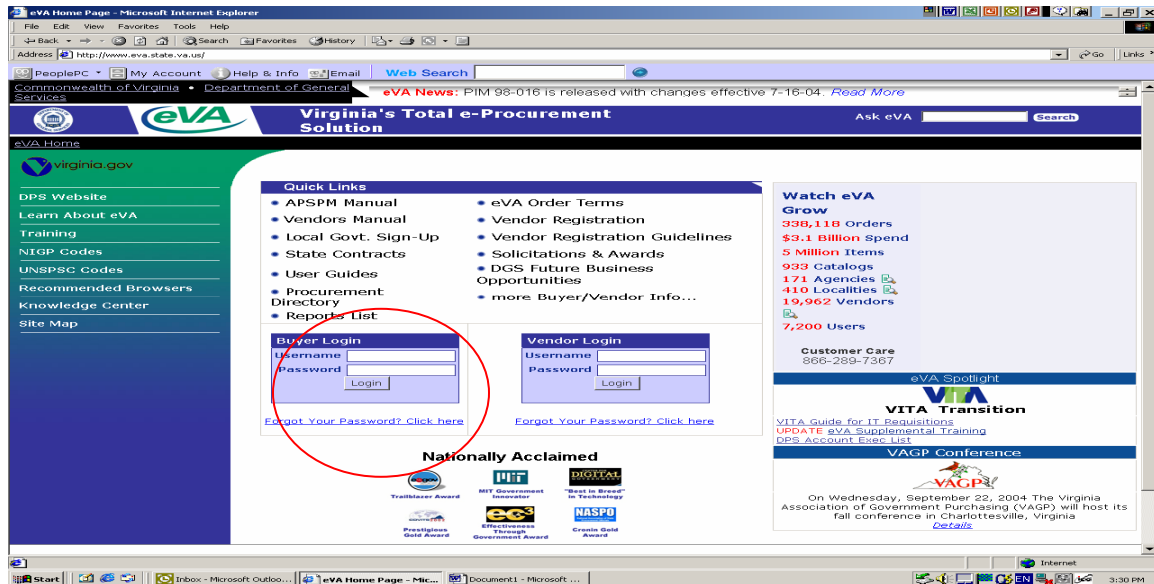


- Click OK to confirm approval.

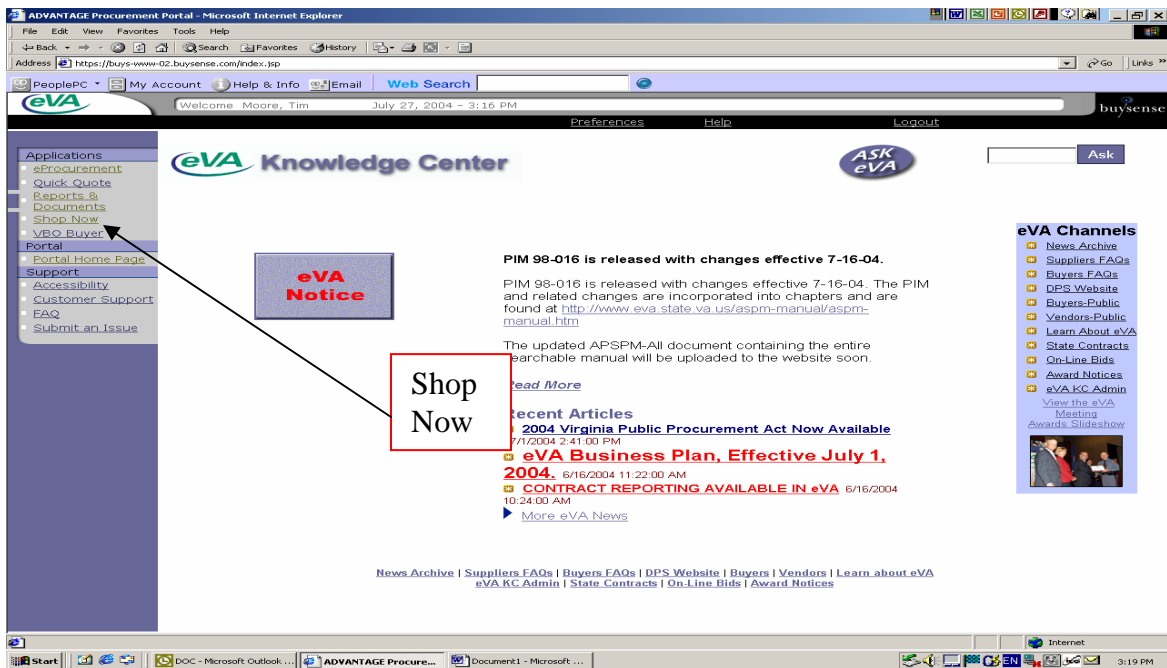
Receiving Orders

Infrastructure Goods and Services: Receiving for all IT infrastructure goods and services orders must be accomplished in eVA. When an order reaches the Ordered status, a receiving document is created and placed in the receiving in-box of the person designated to do the receiving. If the agency is set up for Desktop Receiving the shell will be available to the person who initiated the order. If the agency is set up for Central Receiving, the receiving must be done by the person or persons given the receiving role.

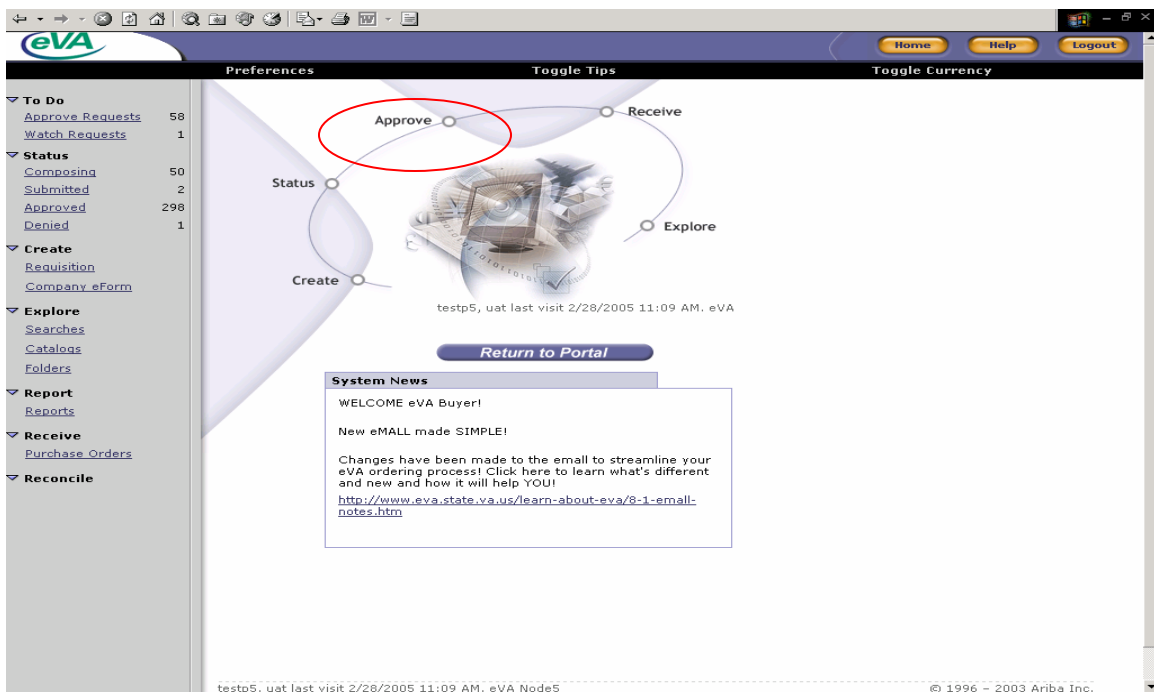
Non-infrastructure IT Goods and Services: These services will be ordered from a commercial supplier and Billed To the agency. Therefore, VITA does not require receiving in eVA for these items.



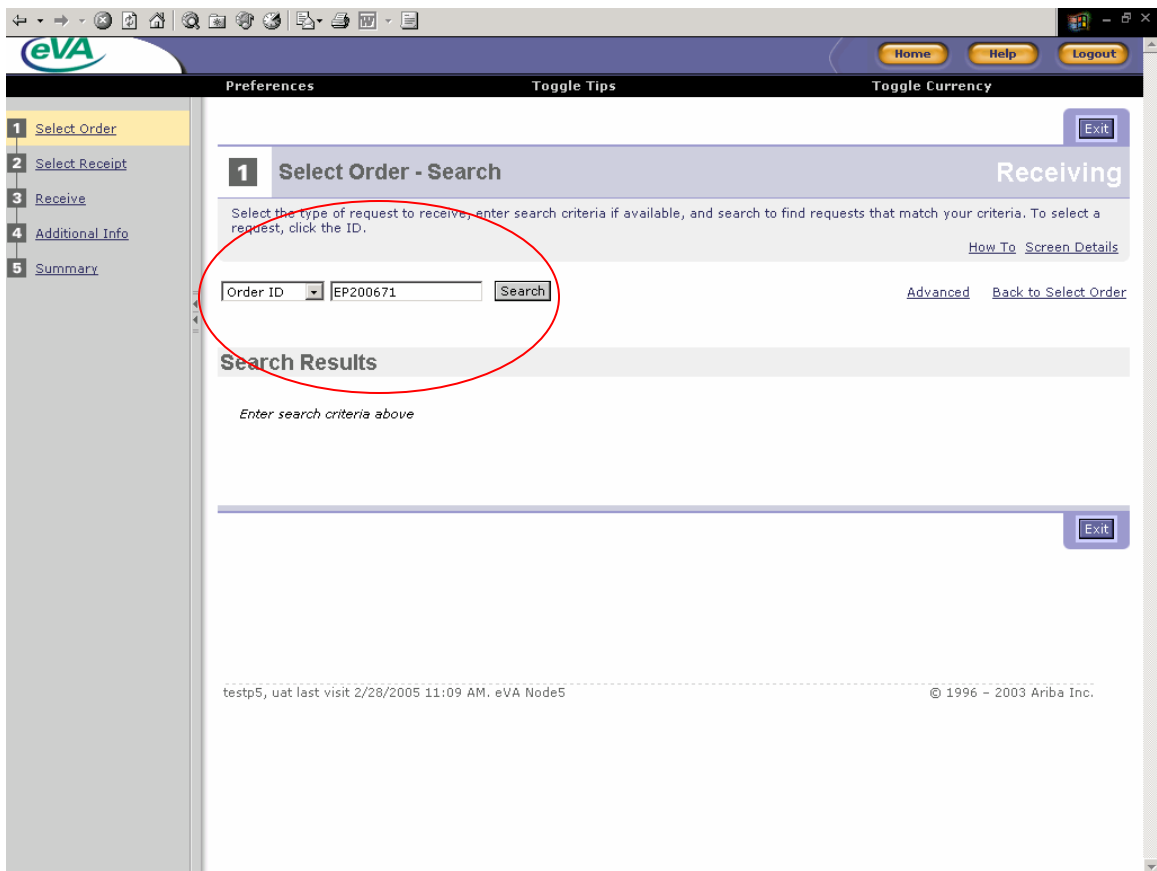
- Go to www.virginia.gov
- Enter your Userid and password and click login.
- Do not allow Windows to save your password.
- Answer “yes” to the question about going to a secure site.



- At this screen click Shop Now on the left navigation bar.



- Click on the Receive button.



- Enter the order number (EP) that you wish to receive and click search.

- The receiving document will open.
- If the entire order has been received, you can click Accept All at the top or you can type in the quantity received in the Accepted box.
- If you are receiving/accepting less than the full order quantity, type in the actual quantity received.
- The Date Received is defaulted to the current date. This date should be changed to reflect the actual date received by clicking on the calendar and selecting the received date.
- Note that the default on the Close Order is “No”. If you do a partial receipt by entering a quantity of less than the quantity ordered or not receiving all lines, the system will create another receipt document for the remaining quantity and put it in the Receive folder.
- If you receive less than the full quantity and the remaining items will not be provided by the vendor, Close Order should be changed to “Yes”. In this circumstance the system will not create another receiving document.
- After completing all entries, click the Submit button at the bottom of the screen.

- In the previous receipt, two of the four items were received.
- Clicked on return to Home.
- Click on Receive again.

1 Select Order
2 Select Receipt
3 Receive
4 Additional Info
5 Summary

1 Select Order - Search Receiving [Exit](#)

Select the type of request to receive, enter search criteria if available, and search to find requests that match your criteria. To select a request, click the ID. [How To](#) [Screen Details](#)

Order ID: [Advanced](#) [Back to Select Order](#)

Search Results

Enter search criteria above

[Exit](#)

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- Searched for the same order again.

1 Select Order
2 Select Receipt
3 Receive
4 Additional Info
5 Summary

Receipt RC201335: EP200671 - Dell Test - 01-20-2005 [Prev](#) [Next](#) [Submit](#) [Exit](#)

3 Receive Items Receiving

Enter the amount or quantity you are accepting or rejecting, and include the receipt date. When entering rejection details, explain your reason for rejection in comments. When verifying a milestone, indicate whether or not the milestone is complete. If the milestone will not be completed, explain the reason in comments. [How To](#) [Screen Details](#)

[Accept All](#)

No.	Quantity	Description	Unit	Prev. Accepted	Accepted	Rejected	Date Received
1	4	Latitude D600;IntelREG PentiumREG M Processor 725 (1.60GHz) w/ 14.1in XGA Display	each	0	<input type="text" value="2"/>	<input type="text" value="0"/>	<input type="text" value="Today"/> <input type="button" value="Calendar"/>

Order ID: [EP200671](#)
 Order Title: [Dell Test - 01-20-2005](#)
 Supplier: [Dell](#)
 Contact: [Dell - UAT Testing Do NOT modify](#)
 Header Cross Reference:
 Close Order: ? ☐ Yes ☒ No
 Date: Today, 1:59 PM
 Processing Status: Receiving

Comments - Entire Receipt

Comments:

- Note that a new shell is found with a quantity of two previously received.
- An additional quantity is received.

Re-open Order for Receiving to Create a Change Order: An order that has been fully received or has been closed for receiving must be re-opened for receiving before a change order can be created.

The screenshot shows the 'Select Order - Search' screen in the eVA system. The left sidebar has a navigation menu with 'Select Order' highlighted. The main content area has a header '1 Select Order - Search' and a sub-header 'Receiving'. Below the header, there is a text box for 'Order ID' containing 'ep200671', which is circled in red. To the right of the text box is a 'Search' button. Below the search area is a 'Search Results' section with a placeholder text 'Enter search criteria above'. At the bottom of the screen, there is a footer with the text 'testp5, uat last visit 2/28/2005 11:09 AM. eVA Node5' and '© 1996 - 2003 Ariba Inc.'.

- In the previous steps we created two receipts for EP200671 to fully receive the order.
- There may be occasions when you need to re-open a closed order for additional receiving or you need to do a change order to add additional items to the original order.
- An order that has receiving closed can't be changed without re opening for receiving.
- To reopen, go to Shop Now, Click the Receive button, enter the order number and click on Search.

The screenshot shows the 'Select Receipt' screen in the eVA system. The left sidebar has a navigation menu with 'Select Receipt' highlighted. The main content area has a header '2 Select Receipt' and a sub-header 'Receiving'. Below the header, there is a text box for 'Order ID' containing 'ep200671', which is circled in red. To the right of the text box is a 'Reopen Order' button, also circled in red. Below the search area is a table with the following data:

Receipt ID	Order ID	Title	Date	Status
RC201335	EP200671	Dell Test - 01-20-2005	Today, 1:59 PM	Approved
RC201902	EP200671	Dell Test - 01-20-2005	Today, 2:04 PM	Approved

Below the table, there is a section for 'Order ID: EP200671' and other details. At the bottom, there are checkboxes for 'Do not send any items to eProcurement' and 'Send ALL items to eProcurement'.

- Note that the order is closed to receiving.
- Click on the Reopen Order button.

Receipt RC201911: EP200671 - Dell Test - 01-20-2005

3 Receive Items Receiving

Enter the amount or quantity you are accepting or rejecting, and include the receipt date. When entering rejection details, explain your reason for rejection in comments. When verifying a milestone, indicate whether or not the milestone is complete. If the milestone will not be completed, explain the reason in comments.

[How To](#) [Screen Details](#)

[Accept All](#)

No.	Quantity	Description	Unit	Prev. Accepted	Accepted	Rejected	Date Received
1	4	Latitude D600; Intel REG Pentium REG M Processor 725 (1.60GHz) w/ 14.1in XGA Display	each	4	0	0	Today

Order ID: [EP200671](#)

Order Title: Dell Test - 01-20-2005

Supplier: [Dell](#)

Contact: [Dell - UAT Testing Do NOT modify](#)

Header Cross Reference:

Close Order: ? ☒ Yes ☐ No

Date: Today, 2:12 PM

Processing Status: Receiving

Comments - Entire Receipt

Comments:

- The system opens a new receipt for additional receiving showing the ordered quantity fully received.
- Click Exit.

Confirm Exit

You have asked to exit a request you are editing. Select an action to take with this request.

[How To](#) [Screen Details](#)

You are in the process of editing RC201911 - Receipt for EP200671. Choose what you would like to do next.

- [Save this request](#)
- [Undo any changes](#)
- [Continue working on this request](#)
- [Print a copy of this request](#)

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- Click the Save button to save the receipt for subsequent receiving.
- Return to the Home page.
- Click on Status.

Status

Click a request's ID or title to view request details. You can click check boxes to select one or more requests and then take an appropriate action; for example, move selected requests to a folder.

How To [Screen Details](#)

Requests in progress: 351

Type	ID	Date Created	Status	Title	Total
	PR202426	Tue, 25 Jan, 2005	Composing	Golf Clubs	\$2,500.00000USD
	PR202425	Mon, 24 Jan, 2005	Composing	Copy of Copy to POB-Larry	\$32,500.00000USD
	PR202424	Mon, 24 Jan, 2005	Ordering	Copy to POB-Larry	\$32,500.00000USD
	PR202414	Sun, 23 Jan, 2005	Received	Copy of Equipment	\$35,750.00000USD
	PR202413	Sun, 23 Jan, 2005	Ordering	Equipment	\$35,750.00000USD
	PR202412	Sun, 23 Jan, 2005	Ordering	Untitled Requisition	\$10.00000USD
	QQ:QQ000631_AWD123	Sat, 22 Jan, 2005	Submitted	test	\$41,480.00000USD
	QQ:QQ000631_AWD122	Sat, 22 Jan, 2005	Ordered	test	\$41,480.00000USD
	PR202399	Fri, 21 Jan, 2005	Composing	Untitled Requisition	\$375.00000USD
	PR202393	Thu, 20 Jan, 2005	Ordered	Dell Test #2 - 01-20-2005	\$16,713.40000USD
	PR202344	Thu, 20 Jan, 2005	Receiving	Dell Test - 01-20-2005	\$6,863.88000USD
	QQ:QQ001381_AWD120	Wed, 19 Jan, 2005	Composing	ST 1467	\$300.00000USD
	PR202260	Wed, 19 Jan, 2005	Ordering	Untitled Requisition	\$999.00000USD
	PR202227	Tue, 18 Jan, 2005	Ordering	swam test - 1-19-05	\$30.00000USD

Copy Delete Move to Folder: Archive Items Move

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- Note that the order is now back in a receiving status.
- Click on PR202344.

PR202344 - Dell Test - 01-20-2005 Status: Receiving

Review the request details and then take the appropriate action; for example, depending on the request status, you can approve, deny, edit, submit, receive, invoice, open, or close the request.

How To [Screen Details](#)

[Back to Status](#)

Change Receive Print

Summary Approval Flow Orders Receipts History

Title: Dell Test - 01-20-2005

Use PCard: ☐

PCard number: utestp50011

Entity Code: P194

Fiscal Year: 2004

PO Category: R01

Header Cross Reference:

ERP Requisition Number: test 2

Do not send any items to eProcurement: ☐

Send ALL items to eProcurement: ☐

Line Items

No.	Type	Solicit	Order	Description	Qty	Unit	Price	Amount	Action
1			EP200671	Latitude D600;IntelREG PentiumREG M Processor...	4	each	\$1,715.97000USD	\$6,863.88000USD	Detail

Supplier: Dell
Contact: Dell - UAT Testing Do NOT modify
Commodity Code: Computers, Notebook computers
Contract Number:
Bill To: P194- DPS Mail Room
Small Business: ☐
Minority Owned Business: ☐
Woman Owned Business: ☐

Latitude D600;IntelREG PentiumREG M Processor 725 (1.60GHz) w/ 14.1in XGA Display

Total Cost: \$6,863.88000USD

- Note that the order now has the Change Order button.
- Click Change to do a Change Order.
- You may now add items and you can make some edits to the fully received item. However, you cannot delete the fully received item nor can you delete the item.